

Processed Tomato Products Situation and Outlook in Selected Countries

Production of tomatoes for processing in 11 major producing countries in 2000 is estimated at 22.1 million tons, down 9 percent from the record output in 1999, due mostly to surplus supplies. The mostly notable declines of 21 percent, 17 percent, and 8 percent were registered in the United States, Turkey, and Western Mediterranean countries, respectively (Spain accounted for the region's largest decline). Production of tomato paste in selected countries, excluding the United States, in 2000/01 is estimated at 1.47 million tons, down 2 percent from last year's record level, due mainly to surplus supplies and low international prices. Production of canned tomato products in selected countries in 2000/01 is estimated at 2.2 million tons, down 4 percent from the previous year's record, due mostly to a decline in the Italian output. During this same period, exports of tomato paste pack from selected countries are estimated at 1 million tons, up 13 percent from the previous year, due mainly to larger shipments from Italy, Portugal and Greece. Exports of canned tomato pack from selected countries are estimated at 1 million tons, up 13 percent from 1999/2000.

In the **United States**, production of tomatoes for processing under contract in 2000 is estimated at 9.3 million tons compared with 9.6 million tons forecast earlier, down 18 percent from the record crop in 1999. The decline in output was due mostly to industry seeking to reduce the large carryover stocks and to improve low wholesale prices caused by the closing of Tri-Valley Growers (one of the largest processors of canned tomatoes in the United States). The bulk of U.S. tomatoes for processing goes for tomato paste production.

During the first 11 months of 2000, U.S. exports of tomato products (canned tomatoes, tomato paste, ketchup and tomato sauce) totaled 249,000 tons valued at \$196 million, down 1 percent in volume but up 4 percent in value, from the same period in 1999. Canada remained the number one U.S. customer for tomato paste, sauce and canned tomatoes, while Mexico was the top market for ketchup. U.S. imports of processed tomato products (canned tomatoes, ketchup, tomato paste and sauce) during the same period totaled only 84,000 tons valued at \$81 million, down 49 percent in volume and 43 percent in value, due mostly to a sizable drop in tomato paste imports from Italy.

In **Mexico**, production of tomatoes for processing in 2000 is estimated at 210,000 tons, down from 240,000 tons forecast earlier, and down 3 percent from the revised volume in 1999. This decline was due mainly to lower area planted caused by surplus supplies and lower export prices from the previous year's output. Tomato paste production in Mexico in 2000 is estimated at 28,500 tons

compared with 36,000 tons forecast earlier, down 44 percent from 1999, due to low international prices. Tomato paste production for 2001 is forecast at 31,500 tons, up 11 percent from last year.

In **Brazil**, the production of tomatoes for processing in 2000 is estimated at 1.2 million tons, up from 1.0 million tons forecast earlier, due mostly to higher yielding varieties and few problems with pests. About 70-75 percent of Brazilian production of tomatoes for processing goes into paste and puree, and the remainder into sauces. Output of paste in 2000 is estimated at 110,000 tons, unchanged from an earlier forecast, but down 19 percent from 1999, due to lower yields caused by disease and pest problems. Because of the high costs associated with combating disease and the white fly pest in the Bahia Region, some producers have begun to shift area from tomatoes into the production of bananas, grapes, mangoes, guavas and other more profitable crops.

In **Chile**, production of tomatoes for processing in 2000 is estimated at 925,000 tons, down from 975,000 tons reported earlier, and 3 percent from 1999. This decline was due to unfavorable weather conditions during the harvesting season. The bulk of Chile's tomatoes for processing goes into tomato paste pack, with the remainder slated for canned and tomato sauce production. Output of tomato paste in 2000 is estimated at 115,000 tons, down 7 percent from 1999, due to reduced area. Chile's canned tomato production includes whole peeled, crushed peeled and diced tomatoes.

Mediterranean Area

Production of tomatoes for processing in 2000 in the major producing countries in the European Union (EU) is estimated at 8.5 million tons, down 9 percent from 1999.

In **France**, production of tomatoes for processing in 2000 has been revised to 370,000 tons from 330,000 tons, down 1 percent from 1999, due mostly to lower planted area. During the same period, the production of tomatoes for paste was revised to 44,500 tons from 43,000 tons, down 7 percent from 1999. French production of canned tomatoes in 2000 was also revised to 17,000 tons from 21,000 tons forecast earlier, down 21 percent from 1999. The downward revisions in paste and canned output were due largely to a decline in fruit delivered to processors. France remains a net importer of both canned tomatoes and tomato paste.

In **Turkey**, production of tomatoes for processing in 2000 is estimated at 1.7 million tons, down 17 percent from 1999, due mostly to reduced area. Nearly all of Turkey's industrial tomato output goes into paste production. Production of tomato paste in 2000 is estimated at 260,000 tons, down 19 percent from 1999. After last year's increased world production of tomato paste accompanied by lower international prices, some local processors have reportedly not been able to pay farmers for last year's crop. As a result, some producers have switched area from tomatoes to other cash crops, i.e., corn, vegetables and wheat, for a better return on their investment. Turkish tomato paste exporters are said to have lowered their prices from \$650 per ton in 1999 to \$600 per ton in 2000. China, with its low priced tomato paste, is reported to be a strong competitor to Turkish exports in

the Asian markets. Japan, Saudi Arabia, Russia, Italy, Malaysia, and Korea were Turkey's leading markets in 1999.

In **Greece**, production of tomatoes for processing in 2000 is estimated at 1.2 million tons, down from 1.3 million tons forecast earlier, and down 8 percent from the previous year. Approximately 90 percent of the industrial tomato production is slated for production of tomato paste, passata and juice. Output of tomato paste in 2000 has been revised to 184,500 tons, down from 209,000 tons forecast earlier, due mainly to a decline in fruit delivered to processors. The quality of last year's tomatoes varied from good to average. During the same period, production of canned tomatoes is estimated at 31,400 tons, up slightly from the previous year, reflecting an increase in canned pack stocks.

In **Spain**, production of tomatoes for processing in 2000 is estimated at 1.4 million tons, down from 1.7 million tons forecast earlier, and down 18 percent from 1999. The decline was due mainly to unfavorable weather conditions during the planting season and a lower crop area. During this same period, estimated output of canned tomatoes was revised to 213,000 tons from 229,000 tons, due mostly to fewer deliveries of fruit to processors. Production of tomato paste has also been lowered to 170,000 tons from 184,000 tons reported earlier, due to fewer deliveries of fruit to processors.

In **Italy**, production of tomatoes for processing in 2000 is estimated at 4.7 million tons, down 4 percent from 1999, due mainly to a reduction in planted area in response to larger stocks and low prices of canned and paste packs. Production of canned tomatoes is estimated at 880,000 tons, up 9 percent from 1999, due to increased deliveries to processors and larger projected exports. Production of tomato paste in Italy in 2000 is estimated at 340,000 tons, down 8 percent from 1999, due to over-supply and low international prices. In 2000, exports accounted for 97 percent of Italy's total paste pack.

In **Portugal**, production of tomatoes for processing in 2000 is estimated at 885,000 tons, down 12 percent from 1999, due mostly to heavy rains in April and May, followed by a period of very dry weather during the growing season. Output of processing tomatoes in Portugal consists mainly of tomato paste. Tomato paste production in Portugal in 2000 is estimated at 156,000 tons, down 8 percent from 1999, due to fewer deliveries to processors, caused by adverse weather conditions. Portugal exports the bulk of its tomato paste pack.

In **Israel**, production of tomatoes for processing in 2000 is estimated at 260,000 tons, down 3 percent from 1999, due mainly to reduced area caused by dry conditions. Production of tomato paste is estimated at 28,000 tons, down 23 percent from 1999. Production of canned tomatoes in Israel in 2000 is estimated at 21,000 tons, down 15 percent from the previous year, because of fewer deliveries to processors. The existence of surplus supplies of tomato products in the international market led processors to contract for fewer tomatoes in 2000. Israel exports the bulk of its canned tomatoes and tomato paste output.

(The FAS Attache Report search engine contains reports on Tomatoes and Tomato Products industries for more than 10 countries, including the United states, Italy, France and Chile. For information on production and trade, contact Emanuel McNeil at 202-720-2083. For information on marketing contact Elizabeth Mello at 202-720-9903.)

Table 1: Production of Processing Tomatoes in Selected Countries

Region/ Country	1995	1996	1997	1998	1999	2000
Metric tons						
North America						
United States 1/	10,230	10,350	9,047	8,523	11,645	9,271
Mexico	200	250	300	290	355	216
Total	10,430	10,600	9,347	8,813	12,000	9,487
South America						
Brazil	930	1,000	950	1,225	1,245	1,200
Chile	902	962	912	950	950	925
Total	1,832	1,962	1,862	2,175	2,195	2,125
Western Mediterranean						
Italy	3,450	4,150	3,520	4,372	4,900	4,700
Greece	1,200	1,350	1,245	1,325	1,350	1,220
Spain	907	1,254	981	1,336	1,687	1,382
Portugal	831	905	772	988	997	855
France	287	284	286	327	375	370
Total	5,844	7,943	6,804	8,348	9,309	8,527
Eastern Mediterranean						
Turkey	2,080	1,850	1,080	2,050	2,050	1,700
Israel	315	256	176	267	267	260
Total	2,395	2,106	1,256	2,317	2,317	1,960
Total Mediterranean	8,239	10,049	8,060	10,665	11,626	10,487
Grand Total	21,332	21,706	19,269	21,365	24,230	22,099

Source: U.S. Agricultural Attache Reports, FAS, USDA.

1/ Production data for 2000 is based on contracts.

**Table 2: Canned Tomatoes 1/
Production, Supply and Distribution in Selected Countries**

Marketing Year 2/	Beginning Stocks	Production	Imports	Supply Distribution	Exports	Domestic Consumption	Ending Stocks
Metric tons							
Brazil							
1998/1999	2,855	2,100	6,929	11,884	56	8,973	2,855
1999/2000	2,855	2,150	4,675	9,680	165	8,660	855
2000/2001	855	2,300	6,000	9,155	195	8,600	360
Chile							
1998/1999	1,107	8,500	0	9,607	5,350	3,150	1,107
1999/2000	1,107	8,000	0	9,107	5,733	3,300	74
2000/2001	74	6,000	0	6,074	2,300	3,300	474
France							
1998/1999	6,000	21,100	91,651	118,751	8,814	100,000	9,937
1999/2000	9,937	21,600	82,312	113,849	5,016	100,000	8,833
2000/2001	8,833	17,000	87,000	112,833	5,000	100,000	7,833
Greece							
1998/1999	4,899	32,600	14,000	51,499	18,000	31,500	1,999
1999/2000	1,999	31,800	16,000	49,799	16,000	32,000	1,799
2000/2001	1,799	31,400	15,000	48,199	16,000	31,500	699
Israel							
1998/1999	240	23,400	0	23,640	12,000	8,000	3,640
1999/2000	3,640	24,600	200	28,440	15,000	8,000	5,440
2000/2001	5,440	21,000	250	26,690	17,000	8,000	1,690
Italy							
1998/1999	86,000	1,620,000	7,000	1,713,000	730,000	870,000	113,000
1999/2000	113,000	1,984,000	15,000	2,112,000	805,000	890,000	417,000
2000/2001	417,000	1,930,000	10,000	2,357,000	880,000	900,000	577,000
Spain							
1998/1999	400	206,100	1,500	208,000	69,300	138,500	200
1999/2000	200	232,000	1,830	234,030	57,369	156,661	20,000
2000/2001	20,000	212,500	1,500	234,000	60,000	160,000	14,000
Total							
1998/1999	101,501	1,913,800	121,080	2,136,381	843,520	1,160,123	132,738
1999/2000	132,738	2,304,150	120,017	2,556,905	904,283	1,198,621	454,001
2000/2001	454,001	2,220,200	119,750	2,793,951	980,495	1,211,400	602,056

Source: U.S. Agricultural Attache Reports, FAS/USDA

1/ Includes whole peeled, and/or wedged, diced, crushed, and other non-concentrated products.

2/ Marketing Years are July-June with the exception of France's which is August-July, and Brazil' which is May-April.

Table 3: Tomato Paste

Production, Supply and Distribution in Selected Countries, Metric Tons							
Marketing Year 1/	Beginning Stocks	Production	Imports	Supply Distribution	Exports	Domestic Consumption	Ending Stocks
Brazil							
1998/1999	4,589	135,000	10	139,599	450	121,700	17,449
1999/2000	17,449	110,000	500	127,949	1,000	125,350	1,599
2000/2001	1,599	130,000	400	131,999	600	126,000	5,399
Chile							
1998/1999	1,543	123,353	0	124,896	111,853	11,680	1,363
1999/2000	1,363	123,353	0	124,716	111,853	11,500	1,363
2000/2001	1,363	115,000	0	116,363	100,600	11,710	4,053
France							
1998/1999	1,240	44,100	46,229	91,569	5,125	80,000	6,444
1999/2000	6,444	48,100	70,690	125,234	10,174	83,000	32,060
2000/2001	32,060	44,500	45,000	121,560	10,000	85,000	26,560
Greece							
1998/1999	2,500	215,000	4,500	222,000	203,000	15,000	4,000
1999/2000	4,000	203,000	4,000	211,000	165,000	15,500	30,500
2000/2001	30,500	184,500	3,500	218,500	185,000	15,500	18,000
Israel							
1998/1999	1,000	30,900	0	31,900	19,800	10,600	1,500
1999/2000	1,500	36,800	0	38,300	17,000	13,000	8,300
2000/2001	8,300	28,200	0	36,500	20,200	13,000	3,300
Italy							
1998/1999	99,000	330,000	64,000	493,000	301,000	74,000	118,000
1999/2000	118,000	370,000	56,000	544,000	310,000	74,000	160,000
2000/2001	160,000	340,000	40,000	540,000	330,000	74,000	136,000
Mexico							
1998/1999	0	43,500	5,656	49,156	18,427	30,729	0
1999/2000	0	50,700	10,693	61,393	23,645	37,748	0
2000/2001	0	28,500	10,000	38,500	7,500	31,000	0
Portugal							
1998/1999	7,500	169,342	0	176,842	123,401	28,441	25,000
1999/2000	25,000	170,471	0	195,471	114,349	45,122	36,000
2000/2001	36,000	155,955	0	191,955	125,000	41,955	25,000
Spain							
1998/1999	31,000	146,300	12,000	189,300	54,600	125,300	9,400
1999/2000	9,400	191,400	8,100	208,900	60,000	128,000	20,900
2000/2001	20,900	184,000	8,000	212,900	65,000	128,000	19,900
Turkey							
1998/1999	4,324	310,000	465	314,789	193,616	111,500	9,673
1999/2000	9,673	320,000	0	329,673	190,000	114,000	25,673
2000/2001	25,673	260,000	0	285,673	160,000	117,000	8,673
Grand Total							
1998/1999	151,153	1,424,142	132,860	1,708,155	919,419	597,270	191,466
1999/2000	191,466	1,500,471	149,983	1,841,920	891,168	635,720	315,032
2000/2001	316,395	1,470,655	106,900	1,893,950	1,003,900	643,165	246,885

Source: U.S. Agricultural Attache Reports, FAS/USDA. 1/ Marketing Year (July-June), with the exception of France (August-July), Brazil (May-April), Mexico (March-February), and Turkey (September-August).

2/ 28-30 Percent TSS Basis.

Table 4: United States Exports
Canned Tomatoes, Ketchup, Tomato Paste/Puree, and Tomato Sauce 1/

Commodity/ Destination	1995/96	1996/97	1997/98	1998/99	1999/00
Metric tons					
Canned Tomatoes:					
Canada	19,582	22,909	24,320	20,736	28,052
Japan	11,432	11,271	6,293	13,055	11,195
Korea; Republic of	920	2,181	382	1,431	776
Mexico	696	1,052	1,947	955	1,512
Other	3,652	8,318	4,655	3,101	4,693
Total	36,282	45,731	37,597	39,278	46,228
Ketchup:					
Japan	11,629	9,844	9,390	8,861	6,298
Canada	6,545	4,890	6,771	5,148	5,879
Mexico	3,052	4,842	4,223	4,201	7,183
Brazil	211	430	417	4,035	939
Hong Kong	4,586	4,641	3,458	3,474	3,622
Israel	863	638	1,371	2,171	1,295
United Kingdom	487	1,790	334	1,725	1,651
Netherlands Antilles	505	788	649	969	597
Saudi Arabia	1,768	1,230	1,240	923	1,156
Other	10,447	11,394	12,455	13,102	9,617
Total	40,093	40,487	40,308	44,609	38,237
Tomato Paste:					
Canada	45,326	50,160	46,171	41,556	45,986
Japan	12,354	10,168	14,340	7,455	10,339
Dominican Republic	3,918	2,963	116	6,891	77
Korea; Republic of	5,908	7,502	10,634	5,472	6,423
Philippines	1,470	2,456	5,804	4,623	4,343
Mexico	258	5,195	5,307	3,768	7,188
Taiwan	2,444	1,239	1,839	2,058	1,819
Hong Kong	1,057	1,313	1,313	1,428	1,061
Haiti	2,615	3,631	3,247	1,183	2,097
Other	12,291	44,567	47,054	3,353	10,552
Total	87,641	129,194	135,825	77,787	89,885
Tomato Sauce:					
Canada	47,663	52,721	63,686	71,206	69,507
Mexico	2,374	4,054	5,757	6,303	6,288
Japan	5,594	4,773	4,265	3,278	3,775
Saudi Arabia	1,017	954	1,441	1,917	806
Korea; Republic of	1,529	777	1,840	1,734	2,547
United Kingdom	1,866	1,776	1,586	1,489	3,487
Netherlands	986	1,243	1,250	1,201	1,496
Sweden	598	1,040	1,324	1,015	1,409
Israel	246	196	930	709	2,251
Guatemala	13	50	91	703	1,809
Other	9,205	8,920	10,101	8,797	12,627
Total	71,091	76,504	92,271	98,352	106,002

Source: U.S. Department of Commerce, Bureau of the Census. 1/ Marketing Year (July-June).

Table 5: United States Imports
Canned Tomatoes, Ketchup, Paste/Puree, and Sauce 1/

Commodity/ Origin	1995/96	1996/97	1997/98	1998/99	1999/00
Metric tons					
Canned Tomatoes:					
Italy	23,119	44,155	50,134	42,061	4,348
Israel	19,892	5,339	6,729	11,206	5,644
Canada	4,627	7,057	6,142	10,190	2,861
Spain	2,878	7,092	8,351	6,690	2,248
Chile	12,314	4,431	2,554	3,750	553
Turkey	1,182	1,111	515	141	321
Other	2,602	2,087	2,266	1,003	1,146
Total	66,614	71,272	76,691	75,041	17,121
Ketchup:					
Canada	18,186	17,097	31,786	38,747	37,871
China, Peoples Rep.	0	0	0	222	380
Hong Kong	0	1	0	45	0
India	0	12	17	16	13
Japan	0	0	0	16	0
Other	10	22	11	15	50
Total	18,196	17,132	31,814	39,061	38,314
Tomato Paste:					
Chile	4,334	667	492	27,358	2,347
Mexico	8,004	7,381	8,411	22,815	6,884
Peru	0	654	0	5,948	1,238
Israel	3,675	4,440	1,180	4,722	6,735
Italy	957	1,091	752	4,657	2,284
China; Peoples Republic of	0	0	0	4,265	3,363
Canada	6,242	387	225	1,736	142
Portugal	0	0	8	1,295	0
Turkey	24	214	63	1,282	324
Other	404	467	100	2,113	61
Total	23,640	15,301	11,231	76,191	23,378
Tomato Sauce:					
Canada	4,679	4,976	5,385	5,636	6,037
France	2	0	0	3,016	0
Portugal	4	6	6	1,108	0
Dominican Republic	1,522	1,641	1,266	902	1,848
Italy	217	504	822	631	1,130
Mexico	132	254	69	186	2,868
Other	875	269	327	580	406
Total	7,431	7,650	7,875	12,059	12,289

Source: U.S. Department of Commerce, Bureau of the Census. 1/ Marketing Year (July-June).